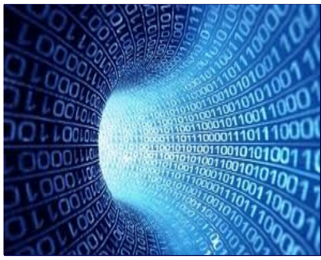

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In This Issue:

Updated QRGs

The SAS&T team has recently created new Quick Reference Guides (QRGs) to help assist users manage projects.

QRG 137: Cost Account Creation
QRG 138: Adding Contact Only Users

Several QRGs have also been updated with refined processes to accomplish ePM tasks.

QRG 15: Submittal Package Review
QRG 16: Submittal Package Management and Completion
QRG 53: ePM Desktop Requirements
QRG 68: ePMXpress
QRG 93: ePM View and Redline Supported File Formats
QRG 110: Capital Projects ePM Utilization Data Quality Report

QRGs can be accessed on the ePM website.

As a reminder, if you have technical questions about ePM, contact ePM Support at epmsupport@gsa.gov.

Big Improvements for the Small Projects Dashboard (SPD)

Unlike a new car driving off the lot, the SPD has not depreciated, it has only gotten better. Prior to the launch of the SPD in June of 2018, a list of enhancements was in the works to make the new dashboard even better. In April, end users will see some big improvements to the dashboard, including 3 new views:

- My Projects - provides summary level information for small projects assigned to a project manager or project sponsor
- Cycle Time - presents the average duration of projects from planning through execution by region, delivery method, budget activity and size
- Project List/Project Fact Sheet - provides a comprehensive list of projects that can be filtered in a variety of ways to be exported for further analysis or to link to a newly designed Project Fact Sheet that can also be exported as a pdf.

Although there are too many updates to list in this article, some additional improvements include adding the population dataset definition to the view, highlighting projects that need attention, adding a record count, and updating logic to match ePM project financials to RETA/IRIS and FMIS. For a full list of the dashboard enhancements, go to the Small Projects Dashboard InSite page.

The SPD was developed to provide GSA employees the ability to review “near real time” portfolio, performance and financial information on the Small Projects Program at any time. It was designed to improve data transparency, ensuring GSA project stakeholders the ability to see the same project information from a single, self-service source at the same time. It is important that project teams keep projects updated in our source systems. The more complete and accurate the data, the more useful the SPD will be for everyone.

If you have questions about the SPD, please contact Tina Atkins (tina.atkins@gsa.gov).

CMc Milestone Has Been Added in ePM

A new milestone, CMc Pre-Construction Services Contract Award (milestone activity code 74) is now available in capital project schedules. This milestone is only applicable to projects with Construction Manager as Constructor delivery method. The milestone will track the CMc Pre-Construction Award separately from the CMc construction option award. Additionally, the existing construction option award milestone has been renamed to Construction or Design/Build Contract Award or CMc Construction Option (milestone activity code 9).

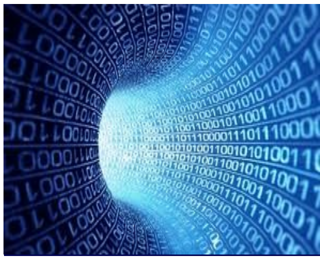
The SAS&T team led a clean-up effort by the regions to input dates into ePM for the new milestone. Project managers of CMc projects should now use the new milestone to designate the date of the award of their pre-construction services contract and use milestone 9 for the construction option date.

Capital Projects ePM Utilization Data Quality Report

The FY19 version of the Capital Projects ePM Utilization Data Quality Report was rolled out this month. The latest version includes several new focus areas: Construction Peer Review (15%, 65%, and 90%), Partnering Session, BIM, Value Engineering Report, Safety Log/Reports, PDRI, and Risk Registry.

The report is now uploaded each week to each region’s ePM Weekly Reports folder in Google Drive as part of the weekly report delivery, but the report can also be run in Cognos. The report can be found in the Measure Reports folder, ODC Measures Reports sub-folder.

An updated Quick Reference Guide has been posted with instructions on how to update each section of the report on the QRG InSite page here.



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Meet the team: Susan Mills

Susan Mills has recently rejoined the ePM Management team as the SAS&T Project Manager in Central Office. Susan had worked on the original ePM contract from 2009 until 2014 in various roles (Trainer, Sr. Trainer, Project Manager and Trimble SAS&T Manager). She has 11 years of experience with Proliance/Prolog/ProjectSight training in various industries: capital and small project construction, heavy civil, government, oil and gas, utilities, medical and education.

Susan's professional background includes Proliance Education Manager for Trimble, Education, Training Lead for AECOM Major Project Solutions, Education Manager for Horizon Software, Trainer and Support for Hardhat Technologies and Runding Corporation for Prolog and Proliance.

Outside of work Susan enjoys camping, photography and spending time with her family.

ePM Resources:

ePM Support
epmsupport@gsa.gov
(866) 367-7878
M-F 7:30 AM - 7:00 PM ET

ePM Portal and User Resources
https://epm.pbs.gsa.gov/portal/

ePM Contacts:

Nick Gicale
ePM Program Manager
nick.gicale@gsa.gov

Chris Clever
ODC Analytics Program Manager
Christopher.clever@gsa.gov

Long Nguyen
PBS CIO Project Manager
Long.nguyen@gsa.gov

GSA

Cognos Corner—Setting Up Report Views and Schedules

Cognos report views are reports that have their own properties, such as prompt values, schedules, and results. Report views are stored with parameters that you frequently use without having to recreate the views each time and with scheduling you can have these report views delivered to your, or someone else's, email inboxes on a regular basis. Also, it is less strenuous on the server usage and generally quicker to execute than running the actual report.

Note: You will need an ePM Analytics license to do these steps. If you do not have an ePM Analytics license, please contact your RSA.

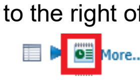
You can use Report Views to share a report specification instead of making copies of it.

1. Select Analytics/Cognos in ePM.
2. Find the report that will be the basis for your report view. On the right hand side of the window, select "More..." from the icons. 

3. The "Perform an action" menu will open. Select "Create a report view of this report." On the next screen, specify a name for the new report as well as a description and screen tip if desired.
4. At the bottom of the screen, select the location of where you want this new report to be stored by selecting "Select My Folders."
5. You can now go to the new report view that you have created and specify the properties that you will need for this report.
6. To select the properties for the new report view go to the report and select the blue arrow on the right hand side of the screen. 

7. The "Run with options" window will open. Make sure that the box beside "Prompt for values" is selected. Select Run and the next window will open to select Report Parameters. You can then choose the properties for your report view and run the report view.

Once the report view is created, you can setup a schedule for delivery. With the example detailed here, the report will run every Monday at 8AM from June 1, 2019 through December 31, 2019.

1. In the My Folders tab, select the Schedule icon located to the right of the report of your choice. The Schedule parameters settings appear. 

2. On the left hand side of the screen, change the Frequency settings to "By Week," enter "1," and select Monday.
3. Modify the Start Date to June 1, 2019
4. Modify the Start Time to 8:00 AM
5. Modify the End Date to Dec 31, 2019
6. Modify the End Time to 5:00 PM
7. In the Options section, put a check mark in the Override the default values box. Select PDF or Excel for Formats.
8. In the Delivery section, on the right hand side of the screen, select "Send a link to the report by email," and then click "Edit the email options."
9. In the new window enter the report recipients and enter an email Subject or body. At the bottom of the screen select the box next to "Attach the report," and deselect the one next to "Include a link to the report." Click OK.
10. Click OK to complete the scheduled activity for this report.

You have now created a report view and scheduled the delivery of the report.